HELPDESK OSP – USER MANUAL

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1 INTRODUCTION

With *HelpDesk OSP* support cases – or other issues that need to be tracked – are formalized in tickets, which are filled out automatically or by the people working at the helpdesk. As the tickets are gathered at a SharePoint site it is easy to organize and co-operate on them, and they can be reached from everywhere over the internet.

We hope that you will get a good understanding of *HelpDesk OSP* by studying this manual and the online video demonstrations. You are welcome to print the manual or parts of it and use it within your organization. You may also change or add text or images so that the manual better suits your needs. To make this easy we have opted to create it in DOC format, as well as in PDF.

When we talk about **clients** in this manual we mean the people who are handling the tickets, for example members of a support team, or the machines used by them.

The images in this manual are mostly from Outlook 2010 and SharePoint 2010, but you may use *HelpDesk OSP* with Outlook 2007 also, refer to Requirements.

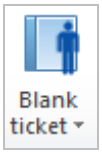
The *HelpDesk OSP* application combines three parts:

- An Outlook add-in which is installed on every machine where tickets should be created with *HelpDesk OSP*. The add-in can also be installed in Outlook on a server, for example for automatic conversion from Outlook Web Access.
- One or several SharePoint list(s)
- An integrated Statistics tool with a report generator

The Outlook add-in has

- A button which allows you to manually create a support ticket from the selected e-mail. (The conversion can also be done automatically.) The e-mails are converted into tickets complete with formatting, priority, sender information and attachments (except .msg files).

- A button for creating a blank ticket, for example if you receive a telephone call or simply wish to publish something to SharePoint from your Outlook. Caller information may be taken from the Outlook Contacts or the GAL.



- A link to the **Report generator**, our application *OLAP Reporting Tool* for Excel.

- A **Settings form** that handles the connection between Outlook and SharePoint.

The Outlook add-in can also have other buttons; refer to *HelpDesk OSP* buttons in Outlook.

If you have **several Outlook profiles**, *HelpDesk OSP* will work on all of them.

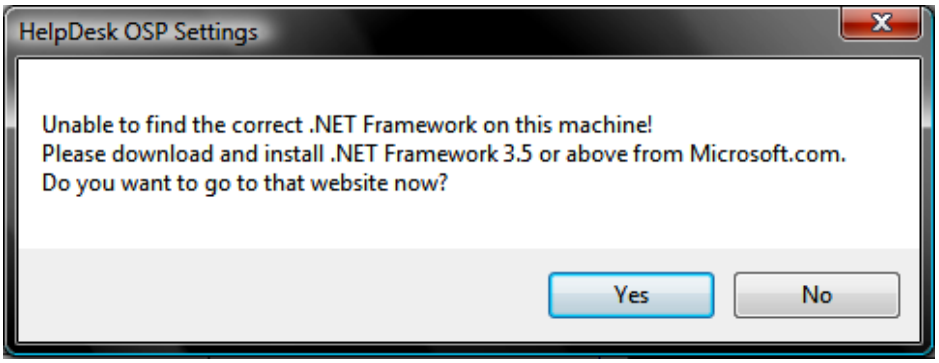
2 REQUIREMENTS

To install and use *HelpDesk OSP* you need **Microsoft Outlook 2007 or above** installed on each client. You also need a functioning **SharePoint site, version 2 or above**. Also Office 365 Outlook and SharePoint is supported.

HelpDesk OSP works with **SharePoint lists**, and those lists can be hosted on many brands of SharePoint as well as both the SharePoint services versions and the SharePoint Portal Server and MOSS versions.

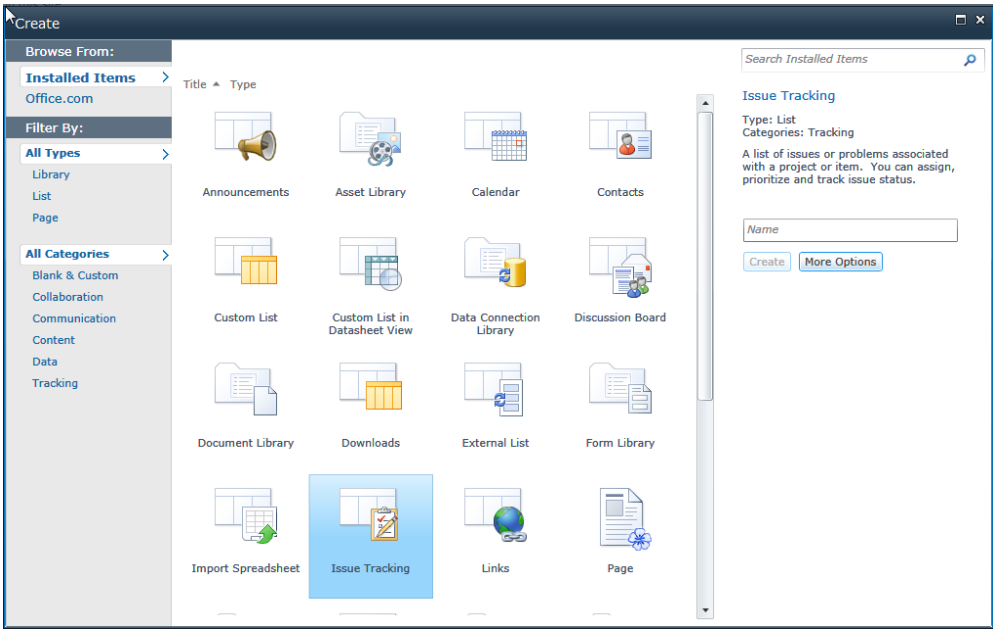
HelpDesk OSP helps you get more out of those platforms, but it does not assist you with the general configuring of them.

Each client also needs to have **.NET Framework 3.5** installed. If you don't have it installed you can download it from Microsoft. If a client without .NET Framework 3.5 tries to open the Configure dialog he gets a message asking him to download this application.

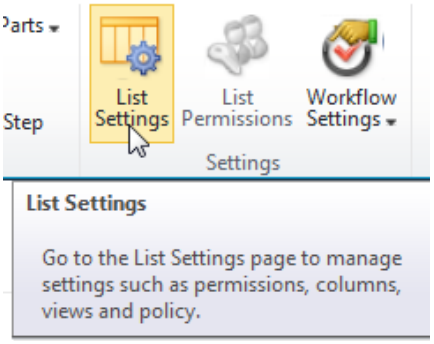

HelpDesk OSP Settings
Unable to find the correct .NET Framework on this machine!
Please download and install .NET Framework 3.5 or above from Microsoft.com.
Do you want to go to that website now?
Yes
No

3 THE SHAREPOINT SITE

If you want to use *HelpDesk OSP* with SharePoint, you must have a SharePoint site set up and functioning. It does not matter if it is hosted online or in-house. Often the Issue tracking list or the Tasks list is suited for helpdesk tickets, but you can use any of the templates provided by Microsoft and customize it after your needs.



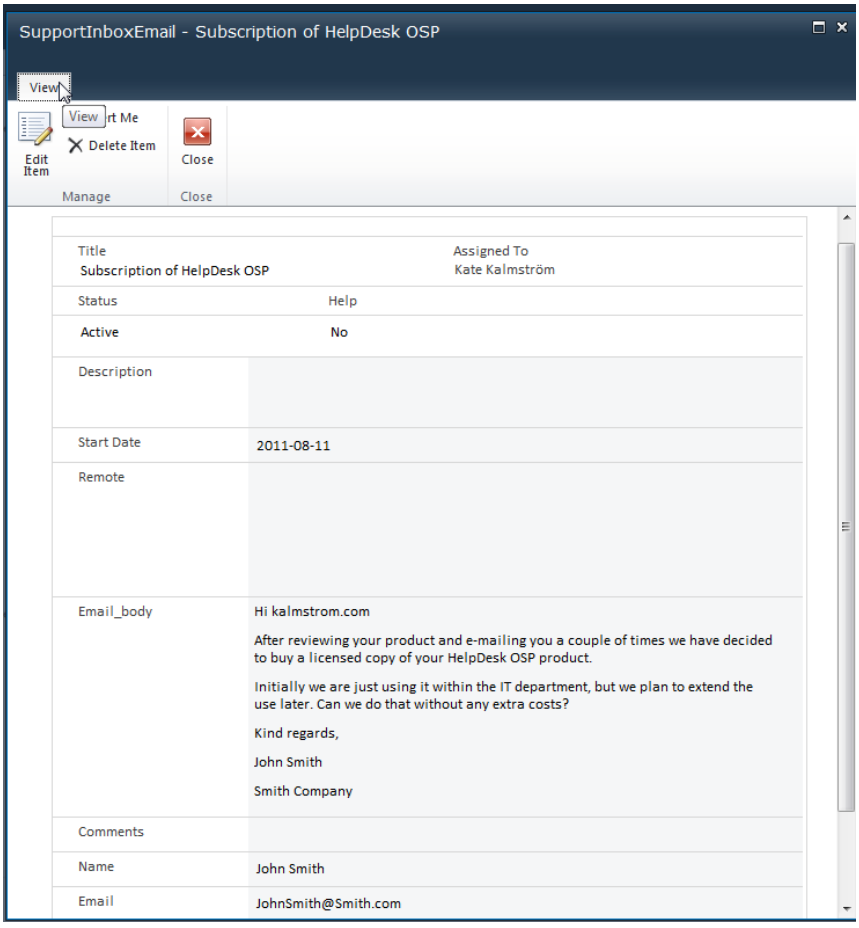
The design of the tickets is very easy to customize, like with all lists in SharePoint.



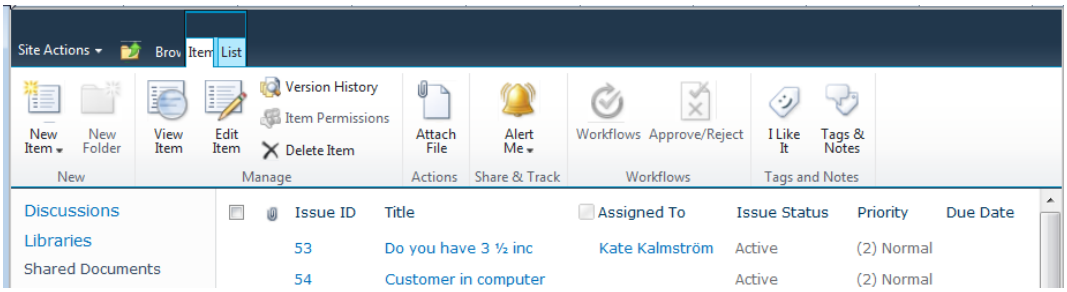
However, **without** *HelpDesk OSP*, there is no connection to Outlook, no e-mail conversion feature, no automatic information about who is calling or having the problem and no address book integration.

4 *THE HELPDESK OSP* TICKET

HelpDesk OSP tickets are regular SharePoint list items. If an e-mail is converted to a ticket with *HelpDesk OSP*, the Description field of the ticket will get the same formatting as the e-mail, and attached files are included. Only .msg files are not yet supported.

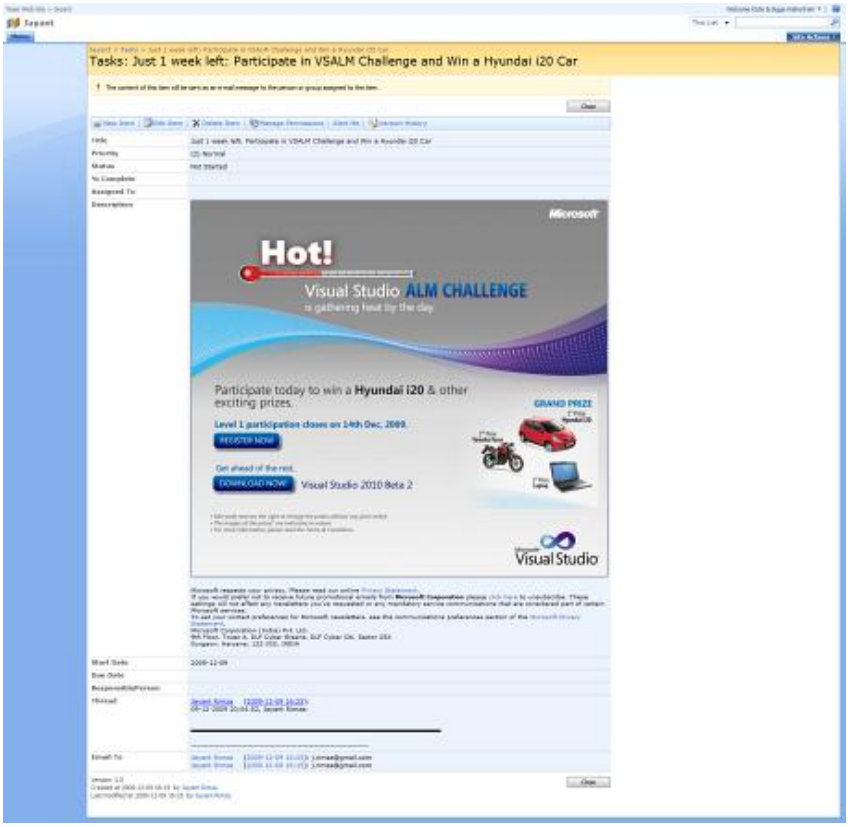


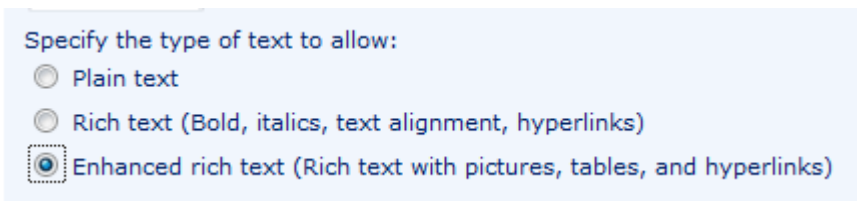
The ticket is shown in the list as a SharePoint list item and can be treated in the same way as any other list item.



If the e-mail has embedded or inline images, they will appear at exactly the same place when the e-mail has been converted to a ticket. If the image has links they will work in the ticket also.

NOTE that this only works if the column mapped with the e-mail body field is set to enhanced HTML.


Tasks: Just 1 week left: Participate in VSALM Challenge and Win a Hyundai i20 Car
Hot!
Visual Studio ALM CHALLENGE
Participate today to win a Hyundai i20 & other exciting prizes.
Visual Studio


Specify the type of text to allow:
Plain text
Rich text (Bold, italics, text alignment, hyperlinks)
Enhanced rich text (Rich text with pictures, tables, and hyperlinks)

5 INSTALLATION OF *HELPDESK OSP*

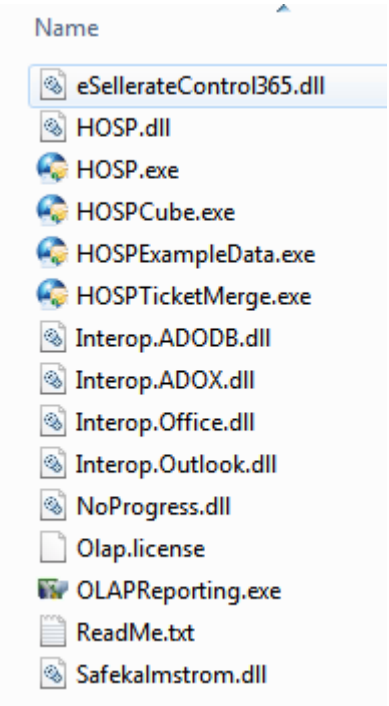
HelpDesk OSP - Wizard
Welcome to the InstallShield Wizard for HelpDesk OSP
The InstallShield(R) Wizard will install HelpDesk OSP on your computer. To continue, click Next.
WARNING: This program is protected by copyright law and international treaties.
< Back
Next >
Cancel

NOTE: Outlook should be closed when *HelpDesk OSP* is installed.

When you click the downloaded file (**HelpDeskOSPSetup.exe**) and are asked if you want to run it, please confirm that it comes from Tallstugans Forlag HB, the mother company of kalmstrom.com Business Solutions. If the file is not digitally signed you should not run it.

When you have clicked the **HelpDeskOSPSetup.exe** file and accepted the license agreements, the file handles the installation by itself. Most of the *HelpDesk OSP* files are installed under Program files, and there are no choices to make. When the installation is finished, you will have the following files in **Program files/kalmstrom.com/HelpDesk for Outlook and SharePoint**.

For a full description of the files and their purpose, refer to General Architecture.



When you open Outlook after the installation you can see a new **Configure** button in the Outlook ribbon. In Outlook 2003 you will instead see a Configure button in the toolbar.

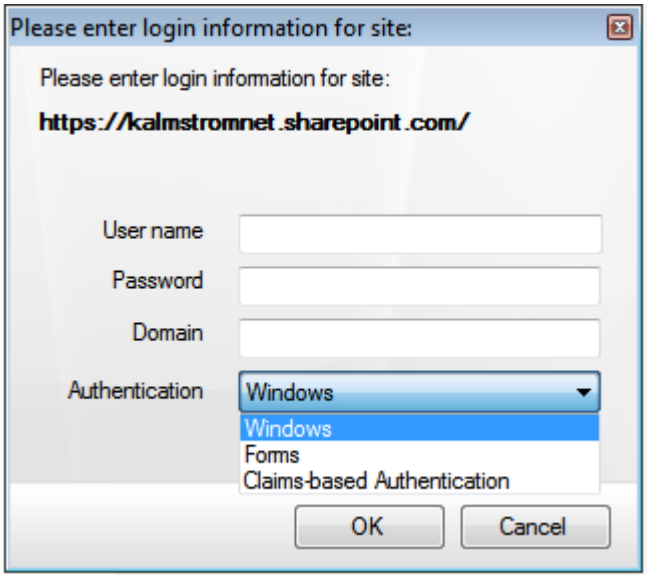
(After you have clicked the Configure button and defined the settings, you will have more buttons, for Creating a ticket from e-mail, for creating a Blank ticket and for *OLAP Reporting Tool*. Refer also to *HelpDesk OSP* buttons in Outlook.)

You will also have a **Statistics button**, to reach the integrated Statistics Tool*, OLAP Reporting Tool; refer to* Statistics Tool. The statistics cannot be used until you have configured a SharePoint list for use with *HelpDesk OSP* and added some tickets to it.

6 LOG IN

When you use *HelpDesk OSP* for the first time, you must log in to the SharePoint site that will be connected to *HelpDesk OSP*. You can opt to save your credentials, and in that case you don't have to log in later.

For best security the password is encrypted when saved to the file **HOSPSettings.xml**. The information about username, password and monitored e-mail folder is also stored locally, while information about site and list mapping is stored in the Global settings list on the SharePoint site.



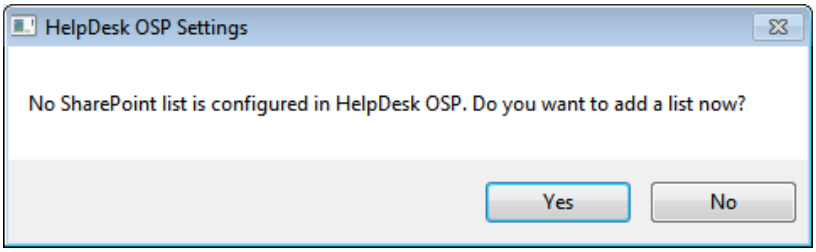
If you select to **remember the login info**, these details can be seen, tested and changed in the Credential Store of the *HelpDesk OSP* Settings, see Credential Store.

6.1 AUTHENTICATION

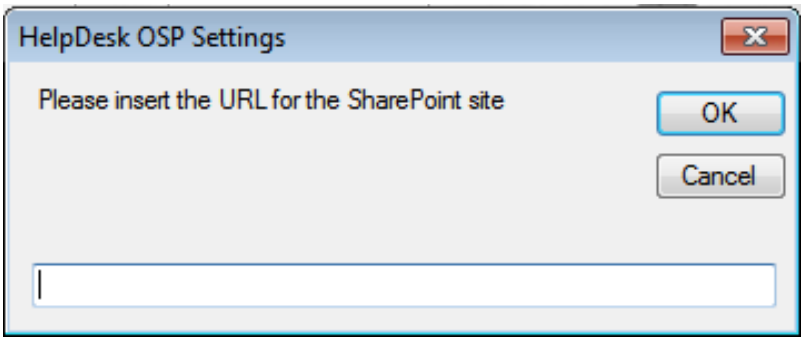
By default Windows Authentication is selected, but choose Forms if your SharePoint site has Forms Authentication. Choose Claims-based Authentication for Office 365.

7 FIRST TIME USE

When you click the **Configure** button in Outlook – or run the file **HOSP.exe** – after installation, the main Configure screen opens. This first time it will give you a prompt to define a SharePoint list which will be used with *HelpDesk OSP*.

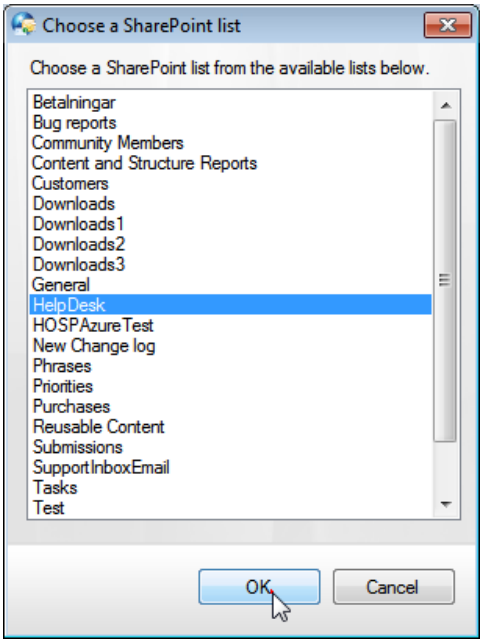


Click Yes, and you will be asked to enter a **SharePoint site**.



You will now be prompted to **log in** to the SharePoint site you have entered, see Log in above.

When you have done that all the lists of that SharePoint site will be shown, and you can **select the list** you need.



Use the **Add list** button if you wish to add more SharePoint lists. Refer to List settings - defines the connection to SharePoint for more info about adding a list to *HelpDesk OSP*.

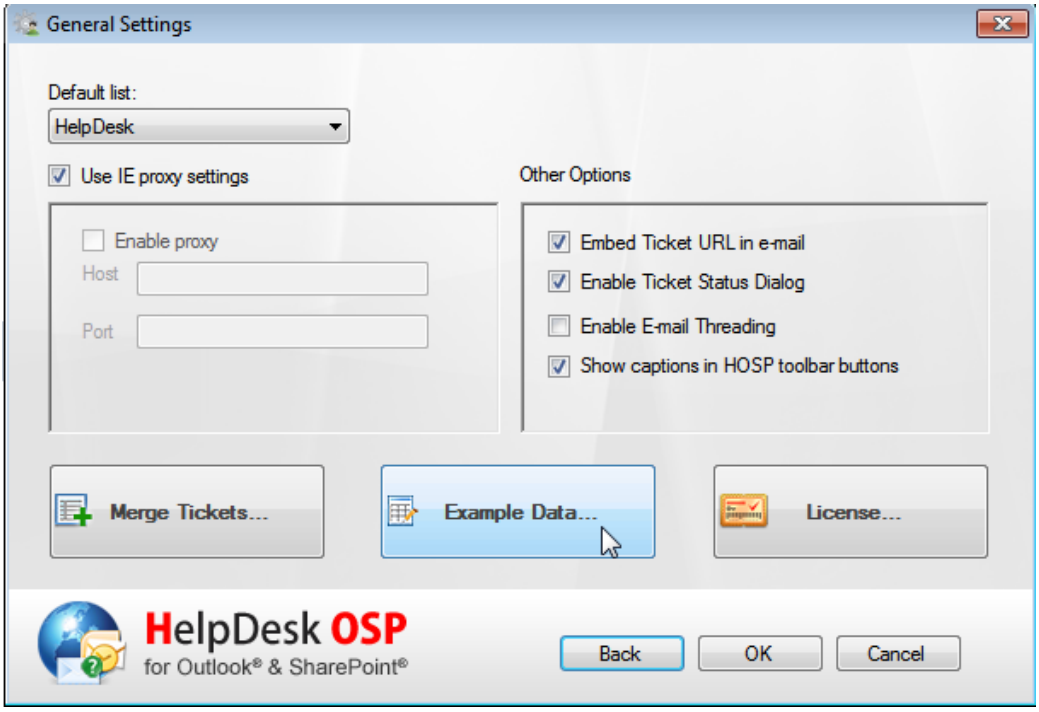
8 EXAMPLE DATA – FOR EVALUATORS

If *HelpDesk OSP* is new to you, it might be a good idea to load the Example Data. They will give you an opportunity to see how *HelpDesk OSP* works when you have much data in it, what performance you can expect and so on. You can edit the Example Data according to your needs, and from the Example Data you can create tickets in the selected SharePoint list.

8.1 LAUNCH THE EXAMPLE DATA APPLICATION

The Example Data application is launched via the General Settings dialog.

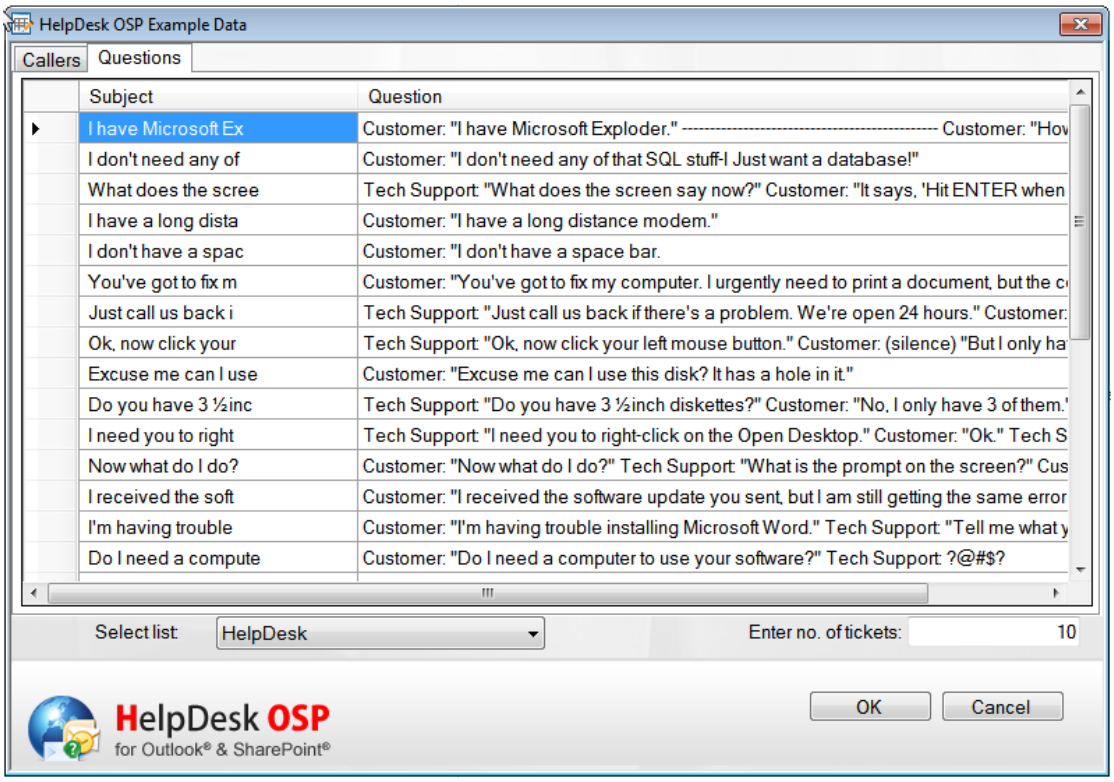
However, **before** you launch the Example Data you have to select a SharePoint list, refer toConfiguration of *HelpDesk OSP*.



8.2 EXAMPLE DATA SECTIONS

The Example Data application contains four sections:

1. Callers: - Details about the callers, like Caller Name, E-mail Address, Telephone number and Category.
2. Questions: - Details regarding the queries, like Subject and question.
3. List: - From this dropdown you should select the SharePoint or Office Live List you have configured.
4. Number of tickets: - Enter how many tickets you want to create.


HelpDesk OSP Example Data
Callers
Questions
Subject
Question
I have Microsoft Ex
Customer: "I have Microsoft Exploder." ---------- Customer: "Hov
I don't need any of
Customer: "I don't need any of that SQL stuff-I Just want a database!"
What does the scree
Tech Support: "What does the screen say now?" Customer: "It says, 'Hit ENTER when
I have a long dista
Customer: "I have a long distance modem."
I don't have a spac
Customer: "I don't have a space bar.
You've got to fix m
Customer: "You've got to fix my computer. I urgently need to print a document, but the c
Just call us back i
Tech Support: "Just call us back if there's a problem. We're open 24 hours." Customer:
Ok, now click your
Tech Support: "Ok, now click your left mouse button." Customer: (silence) "But I only ha
Excuse me can I use
Customer: "Excuse me can I use this disk? It has a hole in it."
Do you have 3 ½inc
Tech Support: "Do you have 3 ½inch diskettes?" Customer: "No, I only have 3 of them."
I need you to right
Tech Support: "I need you to right-click on the Open Desktop." Customer: "Ok." Tech S
Now what do I do?
Customer: "Now what do I do?" Tech Support: "What is the prompt on the screen?" Cus
I received the soft
Customer: "I received the software update you sent, but I am still getting the same error
I'm having trouble
Customer: "I'm having trouble installing Microsoft Word." Tech Support: "Tell me what y
Do I need a compute
Customer: "Do I need a computer to use your software?" Tech Support: ?@#$?
Select list:
HelpDesk
Enter no. of tickets:
10
HelpDesk OSP
for Outlook® & SharePoint®
OK
Cancel

8.3 EDITING EXAMPLE DATA

You can adapt the Example Data to your needs by editing or deleting them. You can also add new data in the grid.

- **Edit**: To edit an existing row, type the new data over the required row as you do in Excel.
- **Delete**: Select the rows from the row header and press the delete key to delete the selected row(s) from the Example Data.
- **Add**: To Add a new row, start filling all columns in last row of the grid. This way you can add new data.

8.4 CREATE EXAMPLE TICKETS

Click on the **OK** button, and the application starts to create Example tickets in the SharePoint list you have selected. The time needed for creation of tickets depends on how many tickets you have selected to create.

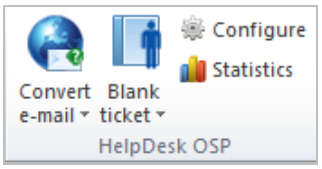
8.5 REMOVE EXAMPLE DATA

When you don't want to use the Example Data anymore, just delete the tickets you created from them in the SharePoint list.

9 *HelpDesk OSP* BUTTONS IN OUTLOOK

When at least one SharePoint list has been added, more new buttons are shown in Outlook.

1. The **Convert e-mail** button allows you to convert an e-mail to a ticket.
2. The **Blank ticket** button allows you to fill out a new ticket when the support question comes in another way. You can pick caller info from your Contacts or Global Address List or fill out the whole ticket manually. See also section 6 about Usage below.



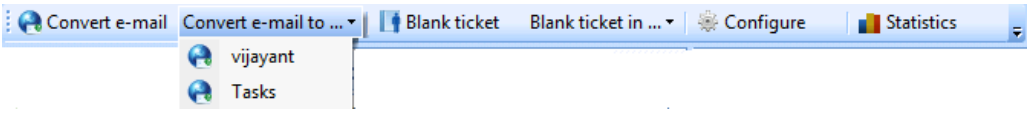
The captions Configure and Statistics can be hidden to give you a smaller toolbar, refer to General Settings dialog.

If you open an e- mail in a new window in Outlook 2010 you will also find a conversion button there.

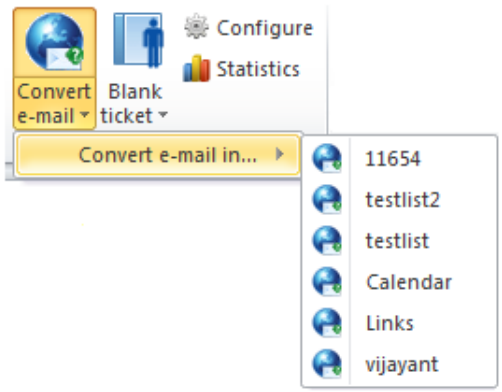
9.1 MULTIPLE LISTS

If you have a selection of several lists but want the ticket to be placed in the default list, just click on the Convert e-mail or the Blank ticket button.

In Outlook 2003 and 2007 you will get two more buttons in Outlook if more than one list is configured for use with *HelpDesk OSP*: "Convert e-mail to" and "Blank ticket in". These buttons give you the possibility to select list.



In the Outlook 2010 banner *HelpDesk OSP* has only two buttons, Convert e-mail and Blank ticket, even if you use several lists: if you press the button the default list will be selected automatically, and if you press the little arrow you will get a choice of lists:



Outlook 2007 gives this possibility when a ticket is created from an opened e-mail.

10 CONFIGURATION OF *HELPDESK OSP*

When you click the **Configure** button in Outlook – or run the file **HOSP.exe** – the main Configure screen opens.

The main screen has four buttons for different settings dialogs and some quick links to features that you also can find in the settings dialogs. The default list is shown here, and you can add lists and enable Live Monitoring (automatic conversion of e-mails).

The two buttons to the top right is for the Merge tickets feature and for the *HelpDesk OSP* User Manual webpage.

10.1 LIST SETTINGS - DEFINES THE CONNECTION TO SHAREPOINT

Press the List Settings button in the main Configure screen, and the List Settings dialog is shown. Here you can define how the connection between Outlook and SharePoint should work. Select what columns in the list item different parts of the e-mail should be published to, and decide if e-mail attachments should be added to the list item. Here you can also add and remove lists.

When an e-mail is converted to a ticket, information from the e-mail is automatically filled out in the ticket. In the List Settings dialog you select **how the different parts of the e-mail should be filled out in the fields of the SharePoint list item**.

If you for example want the Subject of the e-mail to be filled out in the Title field of the list item, you select Title from the drop down. The drop downs are populated with the fields of the list you have chosen.

You can map multiple e-mail fields to the same SharePoint list column if you so

wish.

These SharePoint field types are available for each Outlook field:

- Subject: Single line text
- Body: Multiple lines
- Importance
- Sender name: Single line or multiple lines of text - not person/group yet
- Sender email: Single line or multiple lines of text
- Sender phone: Single line or multiple lines of text
- Sender category: Single line or multiple lines of text

Note: *OLAP Reporting Tool*, the statistics application integrated in *HelpDesk OSP*, does not support these characters in column names: ^ \ ; : / ! and . (dot) in the end. They will not cause any issues in the ticket creation, but they can give problems when used in the statistics.

10.1.1 Global Settings list

If no SharePoint list is configured you will be prompted to add a list to *HelpDesk OSP*, refer to First time use.

The first time a user configures the connection between Outlook and SharePoint a **Global list** is added to the site. The list settings defined by this user are saved into an item in the Global list. This way the first user of *HelpDesk OSP* in the organization defines the list settings for all users. Since the first user creates this Global list he needs to have **Design** or **Full control** permission over the SharePoint site.

10.1.2 Subsequent users

When the first user has selected SharePoint list(s) and defined the conversion information and when the subsequent users connect to the same site, these settings are loaded from the site.

Each time a user selects a site to connect to *HelpDesk OSP*, the application checks if there is Global list with settings for *HelpDesk OSP* on that site. If there is, *HelpDesk OSP* loads the settings in the Global list from the site. (If there is *no* Global list, this user is considered to be the first user, and the application will create a Global list with the settings that this user saves.)

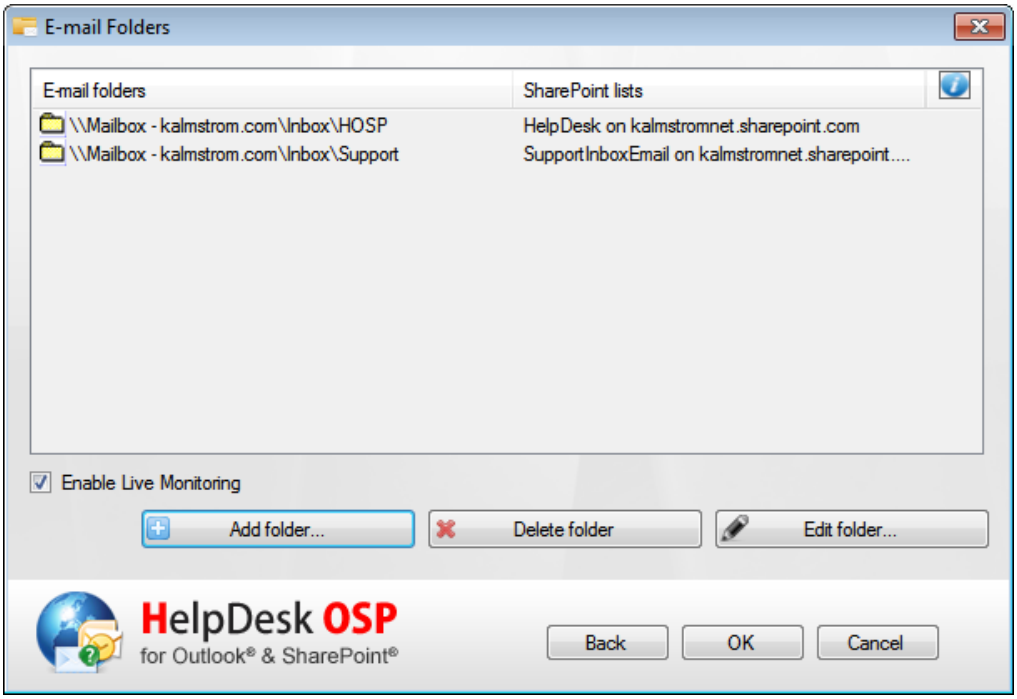
Therefore the subsequent users only have to log in and select a SharePoint list - or several.

10.1.3 List Edits

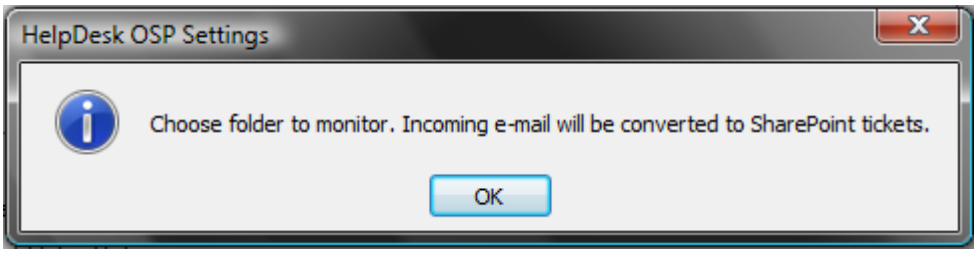
When a user **changes and saves** the list settings, the settings in the Global list are also updated. This way all users get the updated settings next time they connect to the site.

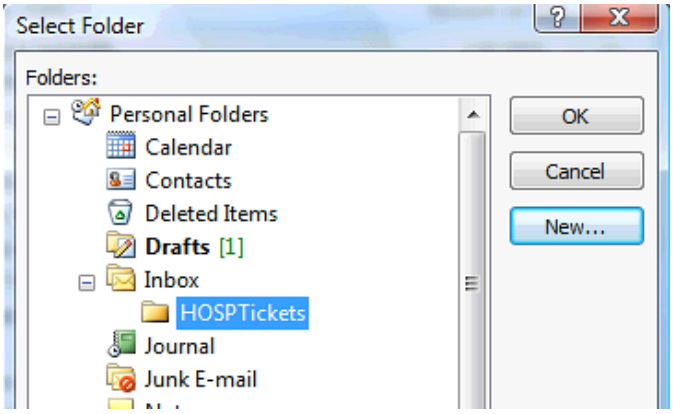
10.2 E-MAIL FOLDERS DIALOG –DEFINES AUTOMATIC CONVERSION

All users who want to convert e-mails to tickets **automatically** must configure how it should be done in the E-mail Folders dialog. The checkbox for Live Monitoring must be checked.

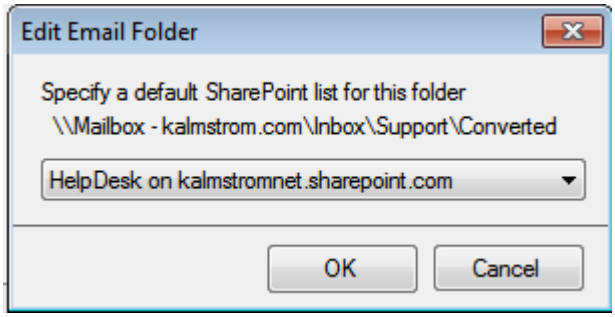


You can Add, Edit and Remove folders to be monitored. If you click the Add folder button you will be asked to select an Outlook folder to monitor.





When you have selected an Outlook folder to monitor, a small dialog window is launched. It allows you to select a default SharePoint list for that particular folder.



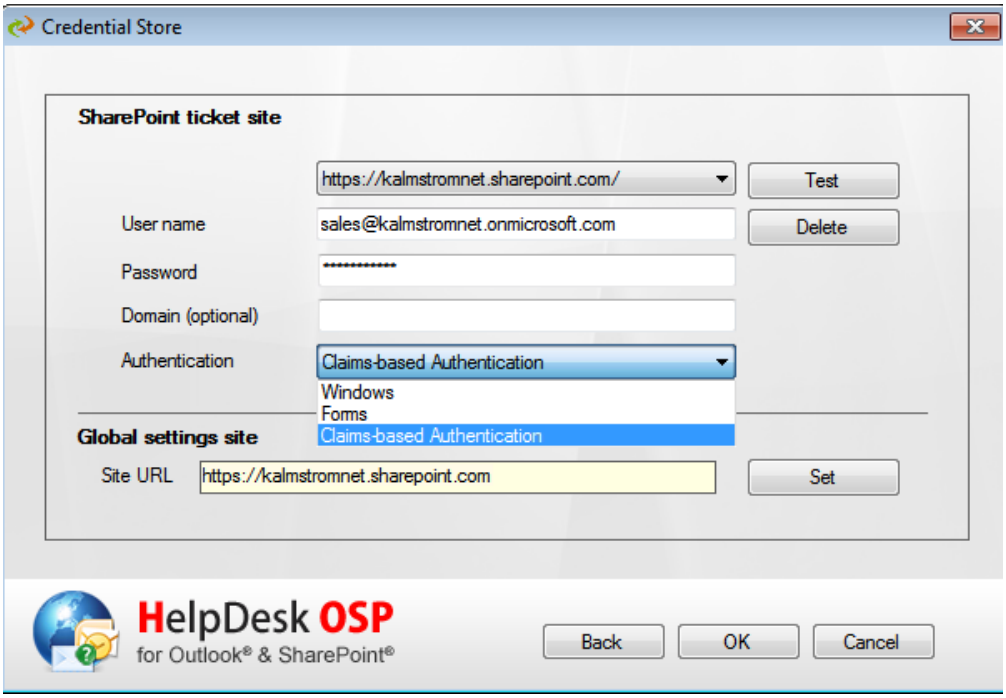
The e-mails from the monitored folder will be placed in a subfolder named **Converted**, once they are converted.

10.2.1 Default lists for different Outlook folders

If you have enabled the automatic conversion and several Outlook folders are monitored, you can select different SharePoint or Office Live lists for different e-mail folders. This is a simple way to distribute the incoming e-mail to different lists.

For example, e-mails to sales@company.com can be converted to list items in the SharePoint-list ”Sales tickets”, while e-mails to support@company.com are converted into list items in the SharePoint-list ”Support tickets.

10.3 CREDENTIAL STORE



When you configure *HelpDesk OSP* and have entered the path to the SharePoint site you wish to use, you are prompted to enter your log in details. If you have selected to remember them, the **login details** can be seen, tested and changed in the Credential Store of the *HelpDesk OSP* Settings.

Here you can also see and change the path to the global list site, where the global settings are saved.

By default Windows Authentication is selected, but choose Forms if your SharePoint site has Forms Authentication. Choose Claims-based Authentication for Office 365.

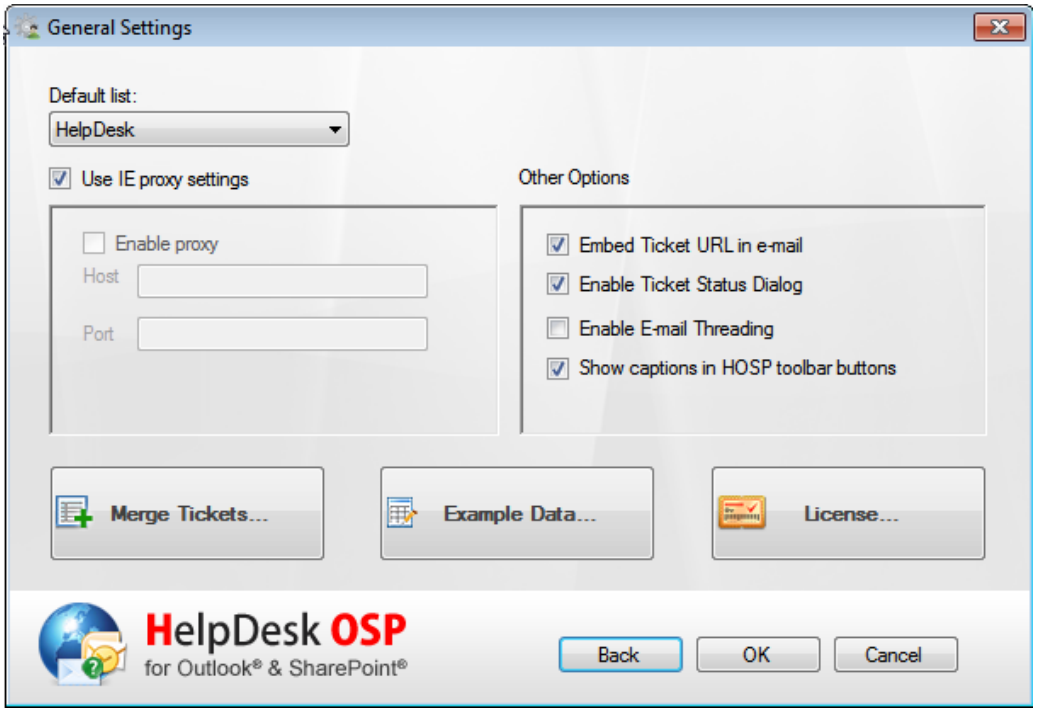
The information about site URL, password and monitored e-mail folder(s) is stored locally on each machine.

10.4 GENERAL SETTINGS DIALOG

In the General Settings dialog some general settings are gathered.

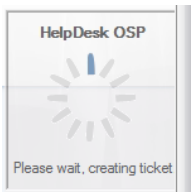
The **default list** is only for **manual conversion** of e-mails to tickets.

The **proxy settings** are helpful for organizations that use a proxy server for their internet connection. By default *HelpDesk OSP* reads the proxy host name and port from Internet Explorer, if proxy is enabled there of course, and makes the connection via the proxy server. Another proxy server address and port may also be used.

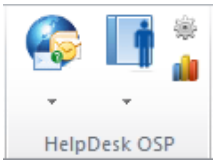


In the General Settings dialog there are also four checkboxes:

1. If you don't want an **URL** to the ticket to be shown in the converted e-mail, uncheck the first box.
2. If you use **Live Monitoring** and don't want to be disturbed by the **status dialog** showing that a ticket is created from an e-mail, uncheck the second box.



3. The checkbox for **E-mail threading** is *not* checked by default. For info about how to use this feature, refer to E-mail threading.
4. If you uncheck the last box, the *HelpDesk OSP* the buttons in Outlook will not have any text.



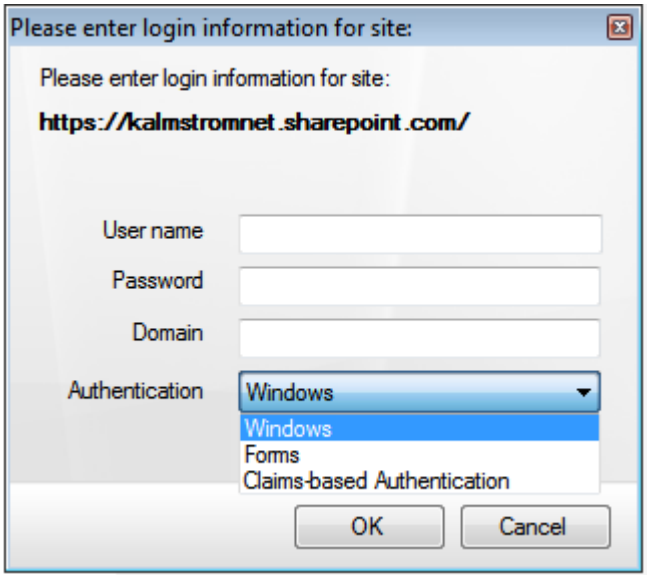
The **Merge ticket** button takes you to a dialog where you can merge tickets into one, *refer to* Merge tickets.

Via the General Settings dialog you can also create **Example data**, *refer to*

Log in

When you use *HelpDesk OSP* for the first time, you must log in to the SharePoint site that will be connected to *HelpDesk OSP*. You can opt to save your credentials, and in that case you don't have to log in later.

For best security the password is encrypted when saved to the file **HOSPSettings.xml**. The information about username, password and monitored e-mail folder is also stored locally, while information about site and list mapping is stored in the Global settings list on the SharePoint site.



If you select to **remember the login info**, these details can be seen, tested and changed in the Credential Store of the *HelpDesk OSP* Settings, see Credential Store.

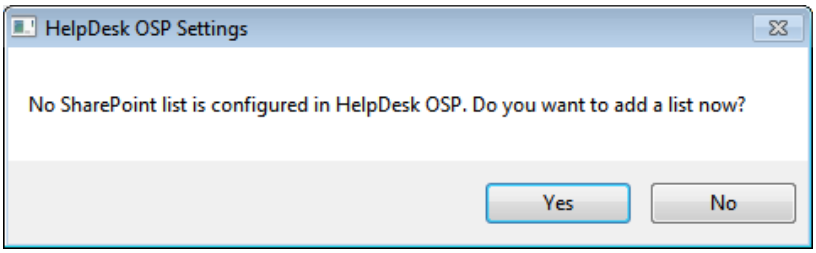
10.5 AUTHENTICATION

By default Windows Authentication is selected, but choose Forms if your SharePoint site has Forms Authentication. Choose Claims-based Authentication for Office 365.

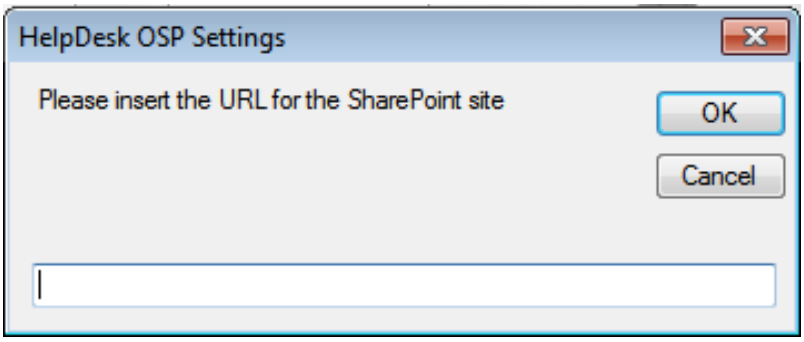
11

12 FIRST TIME USE

When you click the **Configure** button in Outlook – or run the file **HOSP.exe** – after installation, the main Configure screen opens. This first time it will give you a prompt to define a SharePoint list which will be used with *HelpDesk OSP*.

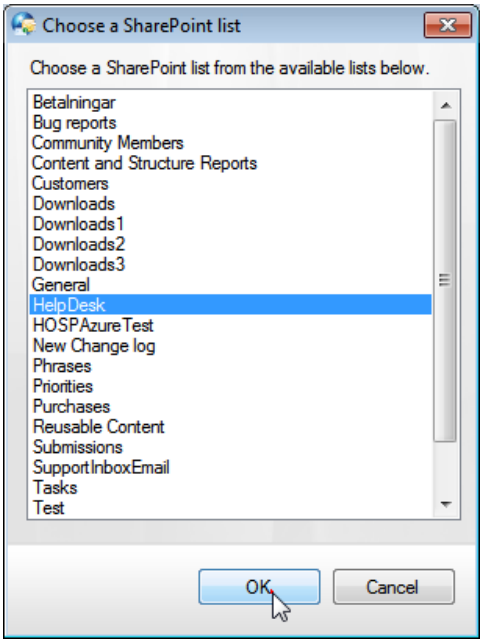


Click Yes, and you will be asked to enter a **SharePoint site**.



You will now be prompted to **log in** to the SharePoint site you have entered, see Log in above.

When you have done that all the lists of that SharePoint site will be shown, and you can select the list you need.



Use the Add **list** button if you wish to add more SharePoint lists. Refer to List settings - defines the connection to SharePoint for more info about adding a list to *HelpDesk OSP*.

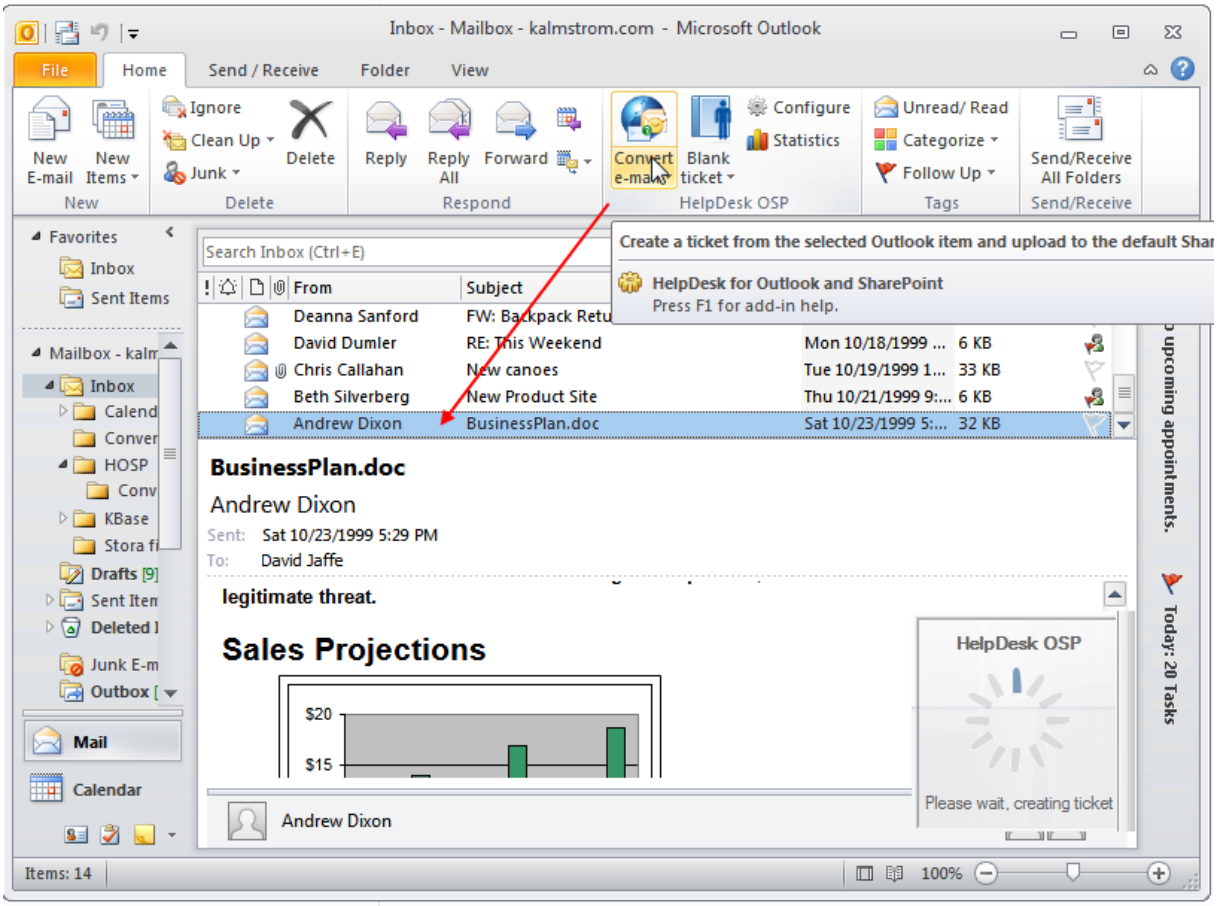
Example Data.

A click on the **License button** gives you the Register dialog, *refer to* Registration.

13 USAGE

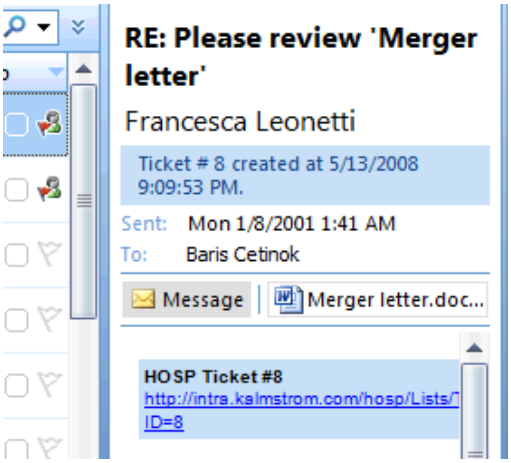
13.1 CREATE TICKET FROM E-MAIL MANUALLY

Click the **Create ticket** button in Outlook to create a ticket from an e-mail manually. The conversion is quick, and you can work with Outlook as usual while it takes place. See also *HelpDesk OSP* buttons in Outlook.

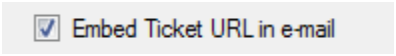


When the e-mail is converted it gets a small icon.

The converted e-mail is marked with ticket number and date and time for conversion.

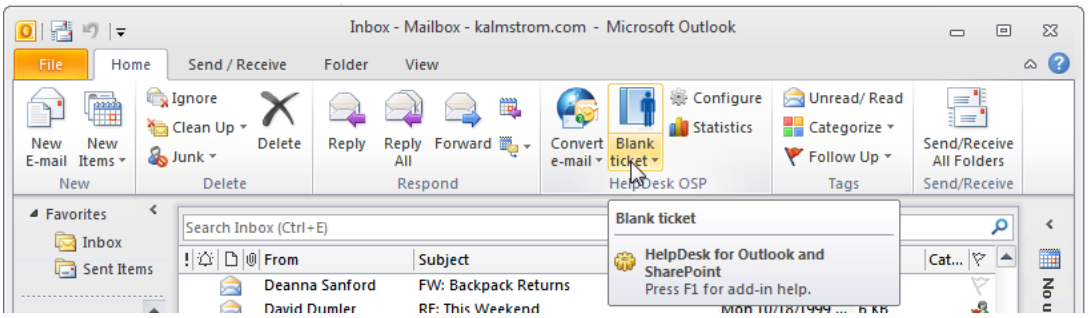


It also gets the path to the ticket itself if you have not unchecked that box under the fourth configuration tab.

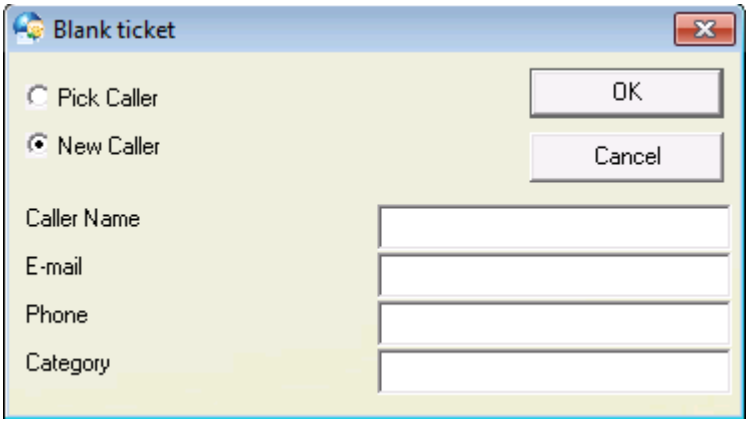


13.2 BLANK TICKET

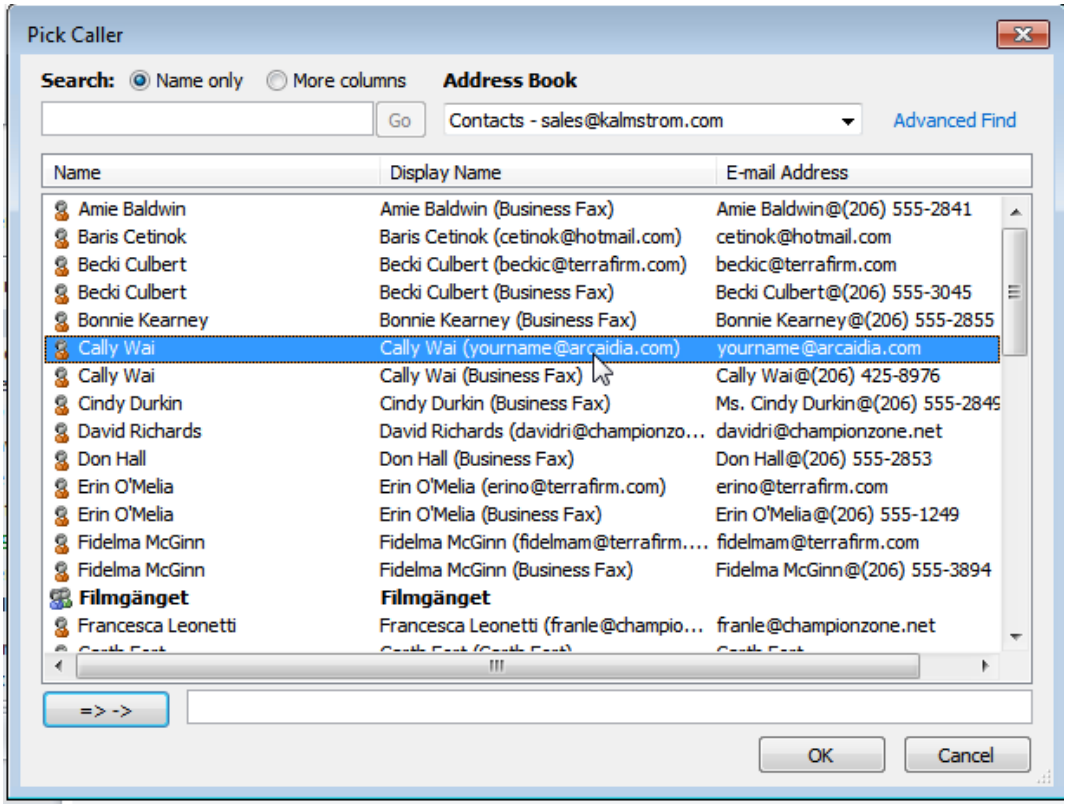
If you get info that should be added to a ticket in another way than by e-mail, for example through a telephone call, you need to create a ticket by pressing the Blank ticket button.



You may either select the caller from the Contacts or the Global address list, fill out that information manually or leave it blank.



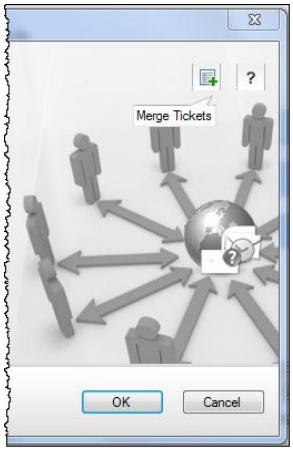
If you want to take caller info from a contacts list, pick the caller and click OK. Then the information is entered in a new ticket, which is created at your SharePoint site.



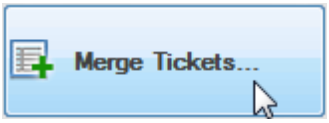
When the new ticket is created it opens in your browser automatically, so that you can fill out the information needed.

13.3 MERGE TICKETS

If you wish to merge several tickets into one, press the Configure button in Outlook and then the shortcut to the Merge Ticket button in the main screen.

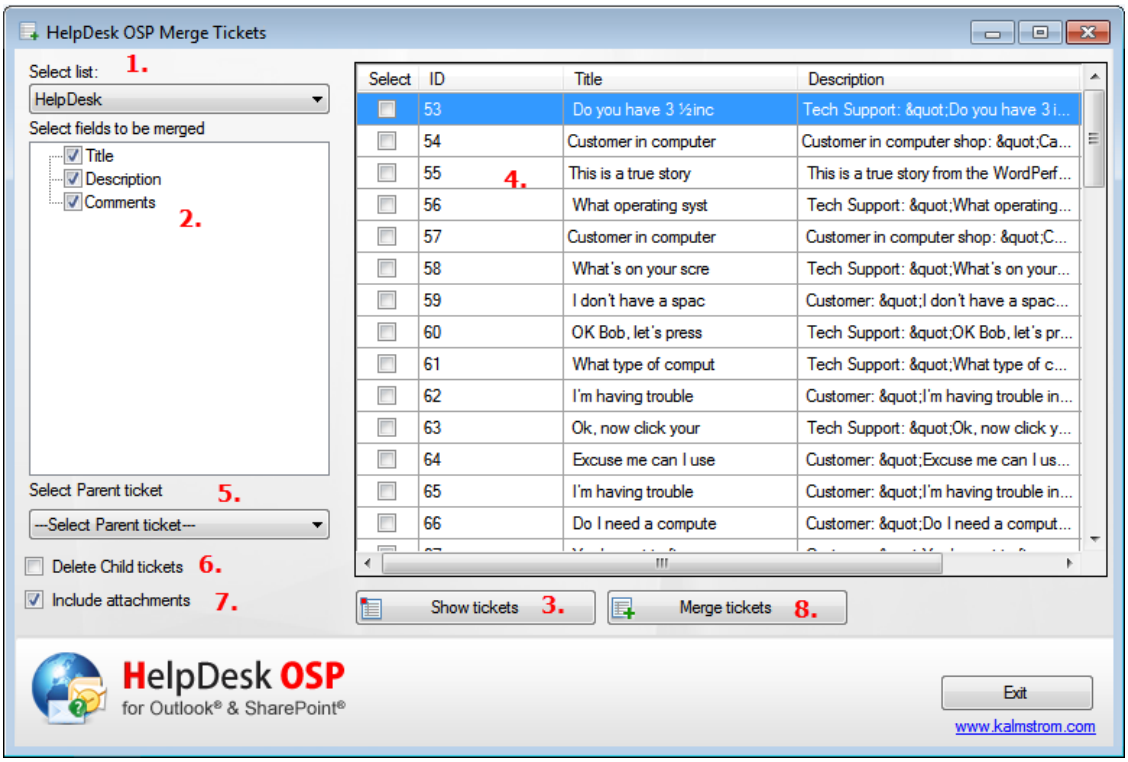


You can also reach the Merge tickets feature from the General Settings dialog.



A Merge Tickets dialog will open. To merge tickets, follow this procedure:

1. **Select a list** where tickets should be merged. If only one list is used for *HelpDesk OSP*, that one will be shown. If several lists are used, you can select the required list from the dropdown.
2. The Merge Tickets feature supports merging text and note type fields. For other fields merging is not possible. **Check the fields** that should be included.
3. Press the **Show tickets** button.
4. Select from the tickets in the grid **which tickets** should be merged into another ticket, the Parent ticket.
5. **Select the Parent ticket**. All the selected parts of the selected tickets will be merged into the selected Parent ticket.
6. Check the delete box if the tickets that have been merged - the Child tickets - should be deleted after having been merged into the Parent ticket.
7. Uncheck the attachments box if you do not want attachments of the Child tickets to be merged into the Parent ticket.
8. Click **Merge tickets** to start the process.



13.4 E-MAIL THREADING

The e-mail threading feature in *HelpDesk OSP* makes it possible to **add each e-mail concerning the same case to the first ticket**, instead of creating one ticket for each e-mail. This process gives the responsible staff a chronological listing of all conversation related to that particular problem. The entire process is executed transparent to the user. The e-mail threading feature works for both manual and automatic conversion.

When an incoming e-mail is converted and E-mail threading is enabled, each time *HelpDesk OSP* finds a SharePoint item with the same ticket ID as the incoming e-mail, the body of the e-mail will be added to the corresponding field of the list item with the same ID. *HelpDesk OSP* will also tag the appended content of the SharePoint ticket with the name of the sender and system time at every update.

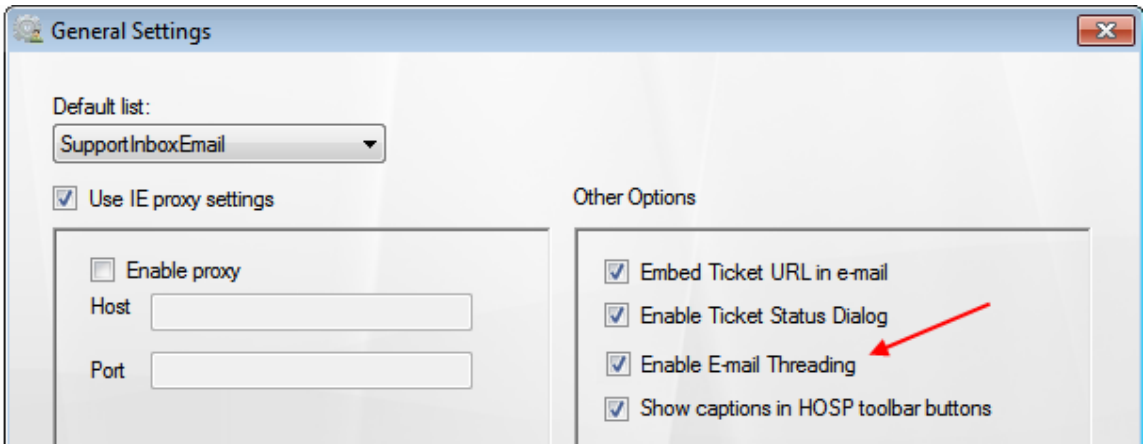
(If an incoming e-mail is converted and *HelpDesk OSP* does *not* find a SharePoint item with the same ticket ID, a new item will be added to the list.)

Note that for **manual conversion** you must convert also the subsequent e-mails. They will be added to the earlier ticket, but you must do the conversion step first.

When the tickets are created manually and there are multiple SharePoint lists to choose from, you have to be careful while selecting SharePoint list from the Outlook toolbar dropdown. If you select the wrong list when creating an e-mail thread and there is a ticket with the same ID in that list, the wrong ticket will be updated with the new information.

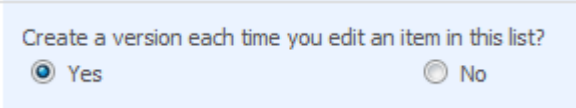
13.4.1 SharePoint and *HelpDesk OSP* settings

The 'Enable E-mail threading' option in the *HelpDesk OSP* settings under **General Settings** must be enabled for this feature to work. You must also make a setting in the SharePointe list(s), see below.

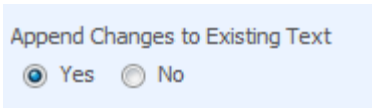


When the checkbox under General Settings is checked and the three settings below are made, every e-mail in a thread will be added to the same SharePoint list item.

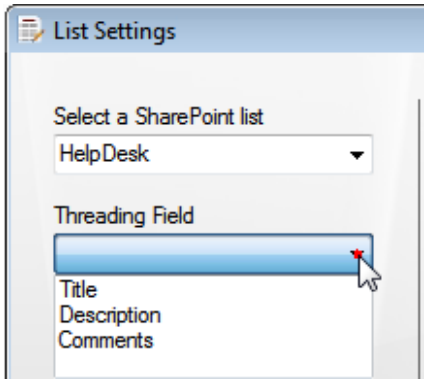
1. In the SharePoint site, under List Settings >General Settings >**Versioning Settings**, activate the option **Yes** for 'Create a version each time you edit an item in this list'.



2. Create/Use a **multiline** field with the setting "Append Changes to Existing Text" set to **Yes.**

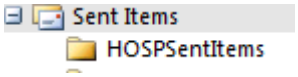


3. This multi-line field has to be mapped with the **Threading Field** in the *HelpDesk OSP* List Settings.



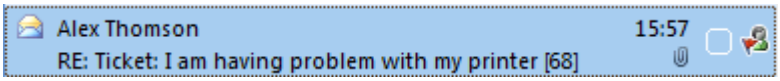
13.4.2 Sent e-mails folder

All sent e-mails of the e-mail threading will be moved to the subfolder **HOSPSentItems** under Sent Items after they have been added into the SharePoint ticket.



13.4.3 The e-mail

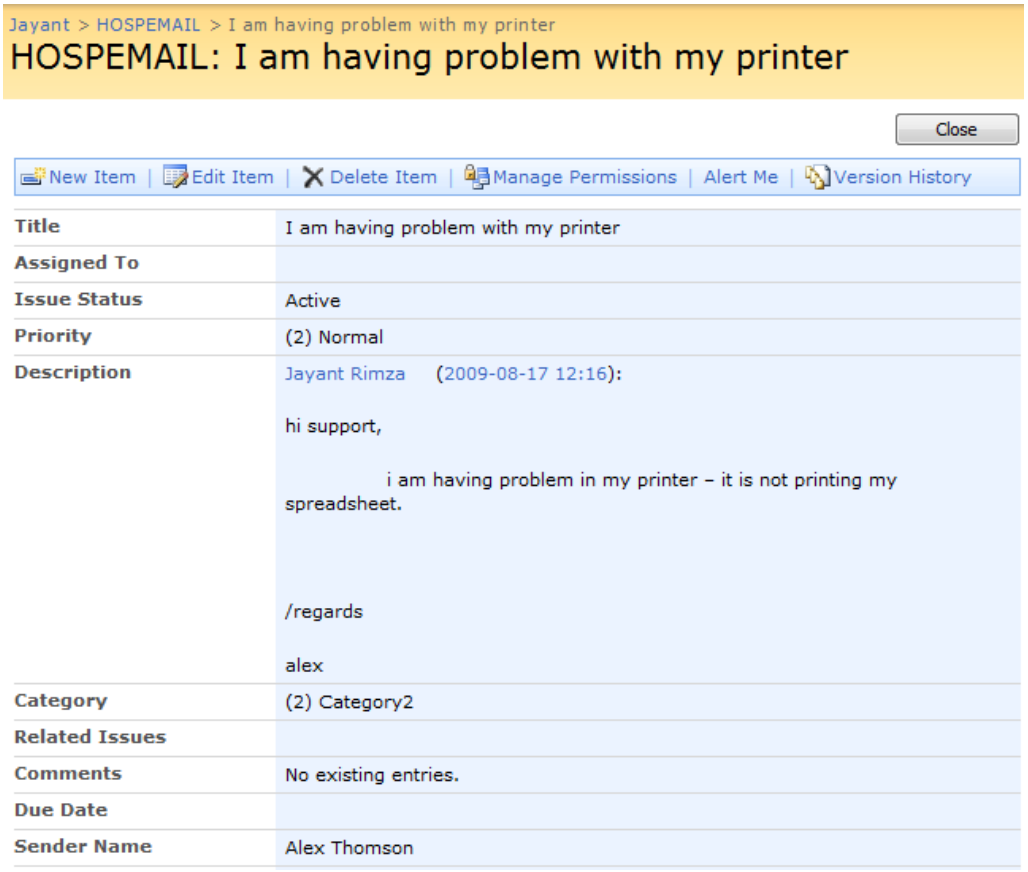
When you create a ticket from an e-mail and the option 'Enable E-mail Threading' is checked, *HelpDesk OSP* will append the ticket ID in the Subject of the processed e-mail (Ticket: + Subject + [ticket id)) to identify its SharePoint\Office Live item ID.



When you reply to an e-mail, make sure it has been converted to a ticket. Otherwise the Threading feature will not work. To check this, see if the subject line of the email has changed to "Ticket: <Subject> [ticket #] "

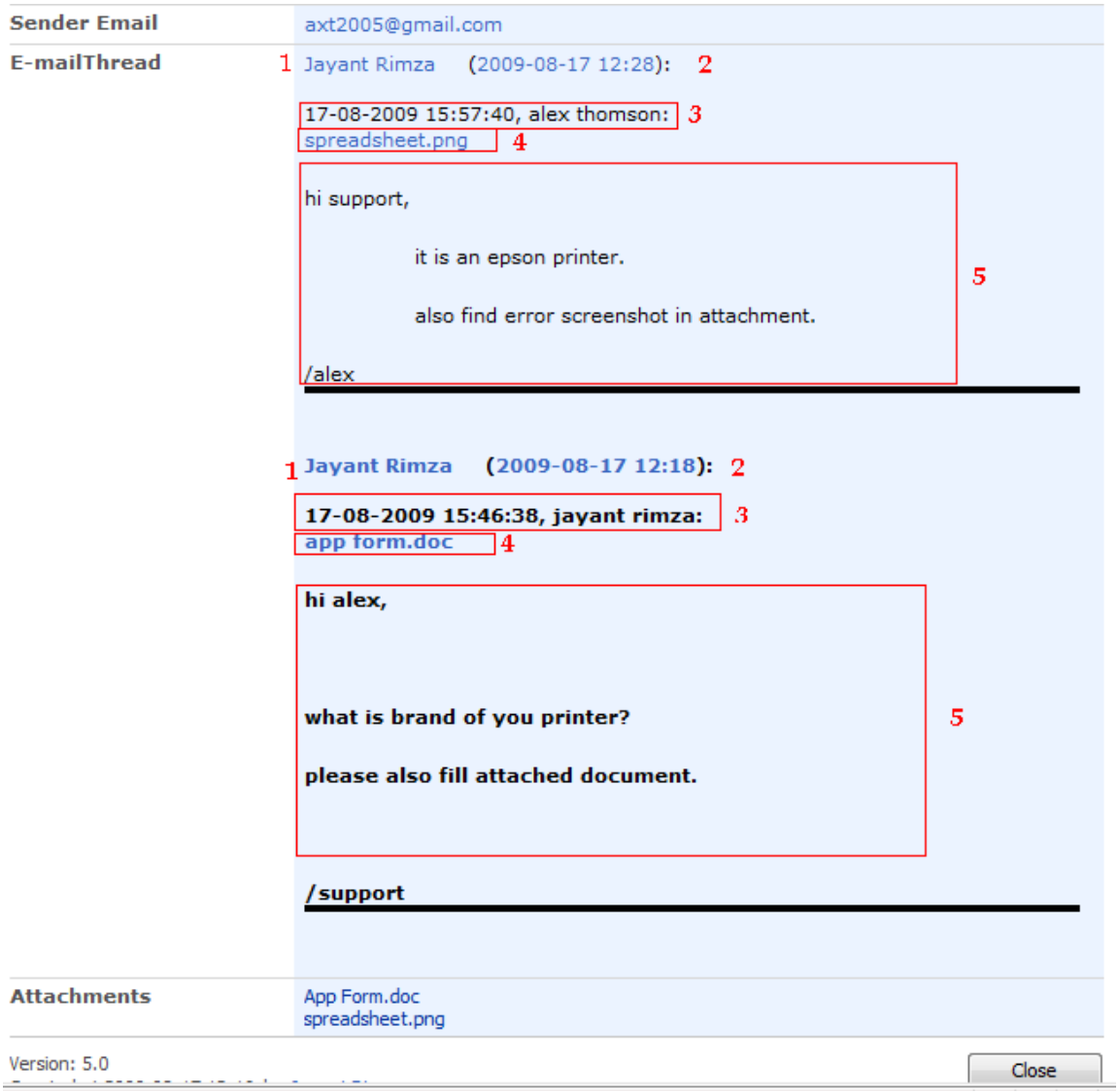
13.4.4 The e-mail thread in the ticket

This is a new ticket, created from the first e-mail of a case:



After that first e-mail more e-mails are sent back and forth. The image below shows how the e-mail thread fields will be built up above the first content:

1. The name of the person logged into SharePoint when the update was made. Filled in automatically by SharePoint on every edit.
2. The time of the addition to the SharePoint item. Filled in automatically by SharePoint on every edit.
3. Send time of the email message followed by the name of the sender.
4. New added attachments path.
5. The new message part read from the e-mail.



13.4.5 Use of E-mail threading + multiple teams and lists

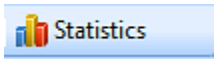
If you have a situation with several helpdesk teams, A and B, using different mailboxes to monitor incoming mails and different lists, you might want to send a case from one team to another, to ask for help. You then have the following situation:

When a processed e-mail having the ticket ID in the subject field from mailbox A is forwarded to mailbox B *HelpDesk OSP* will check if there is a ticket ID tag in the subject. If it is there, *HelpDesk OSP* will try to check if that ticket exists under the SharePoint list B.

If a ticket ID does not exist, *HelpDesk OSP* will create a new ticket in list B, and this is not a problem. But if it *does* exist, *HelpDesk OSP* will add the newest portion to that ticket. Note that the problem of the ticket with that ID in list B is probably not the same as of the e-mail with that ID that originally was for list A.

To avoid this, when forwarding an e-mail from team A to team B, **remove the ticket ID under brackets** and then send the e-mail. That way *HelpDesk OSP* in team B will process that email as a new ticket in list B.

14 STATISTICS TOOL

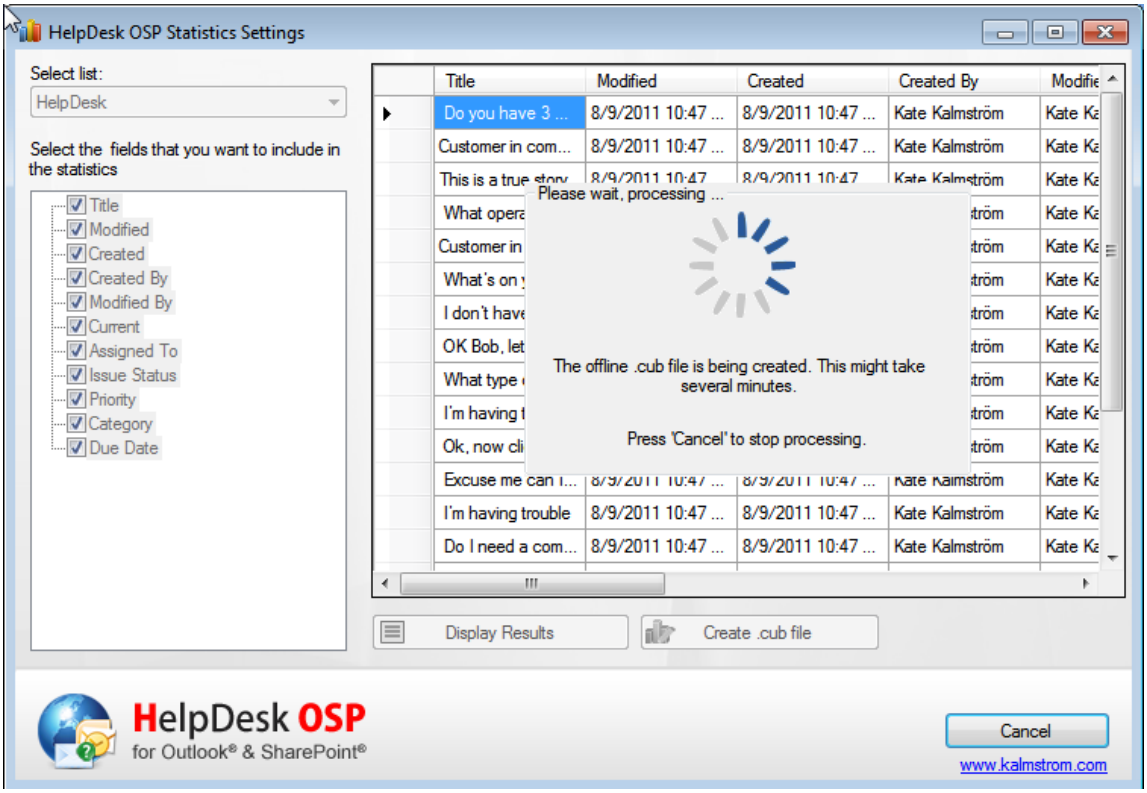


The statistics and reporting tool is reached via the statistics button in the *HelpDesk OSP* toolbar in Outlook. When you click it, you will get a dialog that lets you select SharePoint list and fields for the statistics. By default all the fields in your list is selected. If you want to see what you have selected, press Display results.

When you then click **Create cub** file, a temporary Access database and a .cub file is created and you are connected to the statistics tool, *OLAP Reporting Tool*. The Access database and .cub file are recreated each time you press Create cub file.

To use the statistics tool you need to have the Microsoft Office Web Components for Office 2003 installed. They work fine for Office 2007 and 2010 also.

For more information about *OLAP Reporting Tool*, refer to the presentation of *OLAP Reporting Tool* at the kalmstrom.com website and the manual that can be downloaded from there.



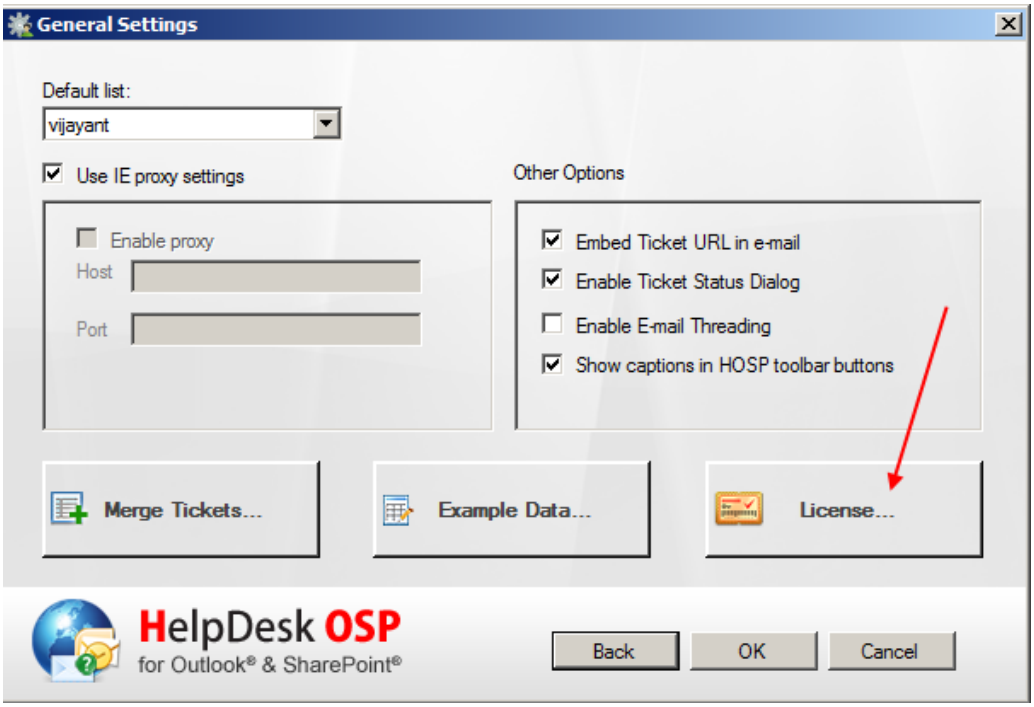
15 KALMSTROM.COM COMMUNITY

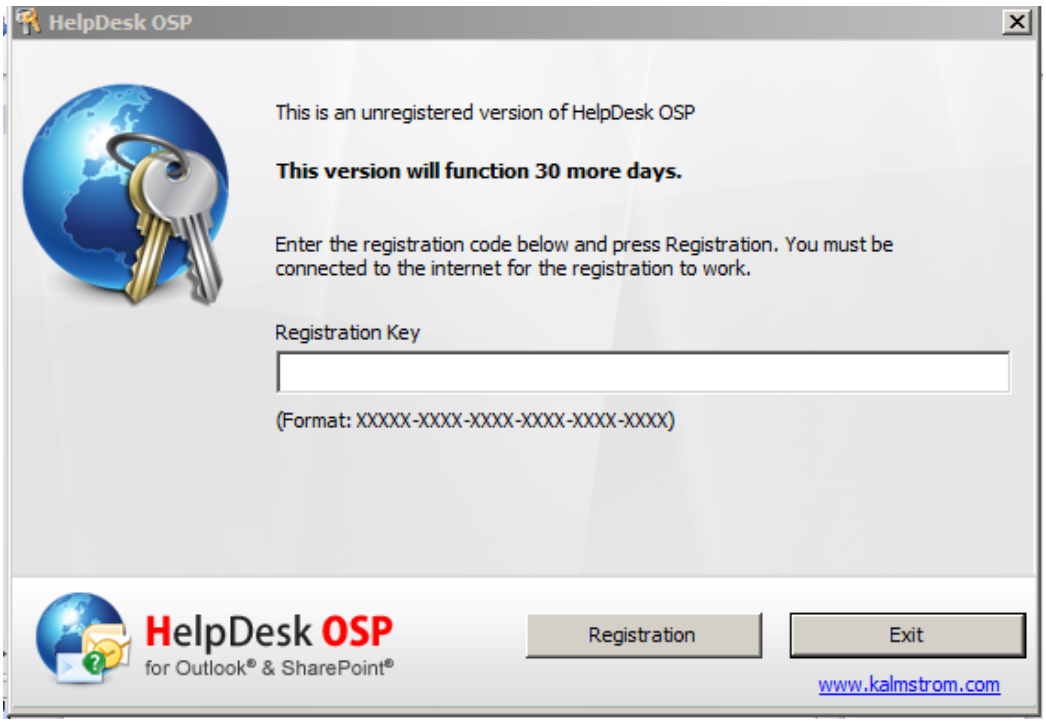
To use *HelpDesk OSP* you must be a member of kalmstrom.com Community and pay the monthly fees. There are three different membership levels, refer to http://www.kalmstrom.com/Community/.

Support, free upgrades and an unlimited number of users within the organization are included in all three levels.

16 REGISTRATION

After the 30 days evaluation period *HelpDesk OSP* stops functioning if it is not registered. To continue using *HelpDesk OSP* each user will have to insert the registration code in the License dialog in the Configuration **General Settings** dialog.




HelpDesk OSP
This is an unregistered version of HelpDesk OSP
This version will function 30 more days.
Enter the registration code below and press Registration. You must be connected to the internet for the registration to work.
Registration Key
(Format: XXXXX-XXXX-XXXX-XXXX-XXXX-XXXX)
HelpDesk OSP
for Outlook® & SharePoint®
Registration
Exit
www.kalmstrom.com

17 CONTACT

The solutions of kalmstrom.com are supposed to be very easy to deploy, use and manage. However, if you have any kind of problem or questions about our software, there are several ways of contacting us:

E-mail	support@kalmstrom.com	Technical issues
	sales@kalmstrom.com	General and sales issues
Telephone	+46 739 206 106	Within USA: (800) 518-4155
Online Chat	www.kalmstrom.com	

18 UPGRADE *HELPDESK OSP*

Upgrades are free for Members of kalmstrom.com Community, and we recommend that you take advantage of this benefit. Follow these steps to upgrade *HelpDesk OSP*. All your settings will be kept.

1. Download the file **HelpDeskOSPSetup** in .exe or .zip format from the kalmstrom.com website. (Extract the .zip file.)
2. Close Outlook if it is open.
3. Run the downloaded file, **HelpDeskOSPSetup.exe**.

If you upgrade to version 3 from a lower version, you need a new registration key. Please contact sales@kalmstrom.com.

19 REMOVE *HELPDESK OSP*

Remove *HelpDesk OSP* through the Control Panel, Add or Remove Programs / Programs and Features. This will not remove the SharePoint list(s) or the items/tickets. It will only remove the integration between Outlook and SharePoint/Office Live.

20 General Architecture

20.1 The files and their purpose

Helpdesk OSP consists of several compressed files. During installation they are automatically extracted and placed in **a HelpDesk for Outlook and SharePoint** folder under **Program Files/kalmstrom.com**, in a **My HOSP** folder under **(My) Documents** and in a **HOSP folder** under **Application Data\kalmstrom.com** or **\AppData\Roaming\kalmstrom.com** (Vista).

In the HelpDesk for Outlook and SharePoint folder:

HOSP.exe	The **HOSP.exe** application is run when you press the Configure button, when you create a SharePoint ticket or manually by clicking this file. HOSP.exe posts tickets to a SharePoint list and lets you save or change your settings, both the locally saved and the settings saved in The hidden site list.
HOSP.dll	The **HOSP.dll** file adds a toolbar to Outlook, so that you can manipulate items in your Outlook mail folders and also register *HelpDesk OSP*.
OLAPReporting.exe	The integrated statistics application *OLAP Reporting Tool* opens when you press the **Statistics** button or manually run this .exe. (*OLAP Reporting Tool* was not designed specifically for *HelpDesk OSP* but can be used for viewing any .cub-files).
HOSPCube.exe	This application is run when you click the **Statistics** button in the *HelpDesk OSP* toolbar in Outlook. It creates the **OLAP cube file** that connects to the statistics tool, *OLAP Reporting Tool*. Each time the **HOSPCube.exe** is run the old cube is removed and a new one is created. **HOSPCube** can also be run manually.
HOSPExampleData.exe	This application is run when you click the **Example Data** button in the *HelpDesk OSP* Settings. It creates demo tickets into selected SharePoint list. You can also edit the data of these demo tickets.

This folder also contains several supporting .dll files.

In the **My HOSP** folder:

SPListItems.cub	This .cub file contains an aggregate of all tickets from a selected list. It is read and displayed by the **OLAPReporting.exe**
SPStats.mdb	This is the **Access database** where your list items are stored. The Access database is not downloaded with the rest of the files but is created automatically the first time you run the **HOSPCube.exe**.

My HOSP also contains two folders for different versions of Office Web Components. They will eventually contain your reports from *OLAP Reporting Tool*.

In the ***HOSP*** folder:

HOSPSettings.xml	This file contains the locally stored settings information: site URL, password and e-mail folder(s) to monitor. The files HOSP.exe and HOSP.dll read from and write to HOSPSettings.xml.

The file **OLAPlicense** is created when the statistics button is clicked the first time. It contains the

registration information for *OLAP Reporting Tool* and is placed under Program files for Win XP and under Documents for Win Vista and 7.

20.2 THE HIDDEN SITE LIST

When the administrator or first user saves the configuration of a SharePoint site in the *HelpDesk OSP* Settings, a hidden list, "HOSPSETTING" is created at the selected SharePoint site. In that list an item is created and in the body of that list item all list info is saved. Thereby all users of the site will get these setting at a fresh installation.

Once the hidden setting list has been created it is available to all other users. When a user adds a SharePoint list via the Outlook Configuration dialog and the application finds a "HOSPSETTING" list on that site, it loads all the configured lists to the user. This way a new user gets all list settings automatically.

If *HelpDesk OSP* finds a "HOSPSETTING" list on the site it overwrites any new settings over previous settings. All the other users get the new settings when they restart their application and connect to the site again.

20.2.1 Permissions

HelpDesk OSP respects the permissions set in SharePoint. If the permissions on the settings list are changed so that only particular users can change it, other users of *HelpDesk OSP* will not be able to change the settings list.